

Multifamily Tenant Characteristics System (MTCS)



Historical Reports Guide
February 2000

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1. Summary

The *Historical Reports* allow users to view historical data in the following five reports:

- Resident Characteristics Report (RCR)
- Key Management Indicators (KMI)
- New Admissions
- Budget Related Averages
- Rent and Rent Burdens

This guide helps users:

- Access the *Historical Reports*
- Interpret and use the MTCS *Historical Reports*

Currently, historical data is limited to quarterly data starting from September 1998.

* This guide is for the *Historical Reports* and is not intended to be a sole source for *MTCS Reports* users. To view detailed information about all MTCS reports, please see the *MTCS Web Reports Guide* web site:

<http://www.hud.gov/pih/systems/mtcs/webusr/webusr.html>

2. Access the Historical Reports

To access the *Historical Reports* directly from the *MTCS Main Menu*,

- Use your mouse to click on the words 'Historical Reports'



The *Historical Reports Selection Menu* appears on your screen.


A screenshot of the 'Multifamily Tenant Characteristics System' Historical Reports Selection Menu. The title is in bold blue text at the top. Below it, 'Historical Reports Selection Menu' is in smaller blue text, and 'Main Menu | Logout | Help' is in even smaller blue text. The background is a light yellow gradient. Below the title, there are two dropdown menus: 'Select a Program' and 'Select a Level of Information'. To the right of these is a date selection dropdown labeled 'Select Date(s)' with a list of dates: 'December, 1999', 'September, 1999', and 'June 1999'. To the right of the date selection is a 'Continue Selection' button.

2.1. Program Selection

You must select a program type to view historical reports.

Available program types include:

1. Public Housing
 2. Indian Mutual Help
 3. Indian Rental
 4. Section 8 Certificate
 5. Section 8 Vouchers
 6. Section 8 Moderate Rehabilitation
 7. All Offices of PIH Programs
 8. Public and Indian Housing
 9. Indian Housing
 10. Section 8 Certificates & Vouchers
 11. Section 8 New Construction, HFDA
 12. Section 8 New Construction, non-HFDA
 13. Section 8 Substantial Rehab, HFDA
 14. Section 8 Substantial Rehab, non-HFDA
 15. 236
 16. 221 BMIR-Below Mkt Int Rate
 17. 202 & 811
 18. Property Disposition & Other
 19. All Office of Housing Programs
- Use your mouse to select a 'program' from the drop-down box



2.2. Level of Information

Once you have selected a 'program,' you must select a 'Level of Information'.

Available levels of information are:

1. National
 2. State
 3. Field Office
 4. Metropolitan Area Within US
 5. Metropolitan Area Within a State
 6. County Within a State
 7. County Within a State and MSA
 8. City or Locality Within a State
 9. City or Locality Within a State and MSA
 10. City or Locality Within a State and County
 11. Housing Agency Within a State
 12. Housing Agency Within a State and County
 13. Housing Agency Within a Field Office
 14. Project Within a State
 15. Project Within a State and MSA
 16. Project Within a State and County
 17. Project Within a State and City or Locality
 18. Project Within a Housing Agency
 19. Congressional District Within US
Congressional District Within a State
- Use your mouse to select the Level of Information



- * To view the *Historical Reports*, you must select the Level of Information.
- * See the *MTCS Web Reports Guide* to view detailed information about each report.
- * For detailed information on how to select a 'Level of Information,' please go to the *MTCS Web Reports Guide* web site:

<http://www.hud.gov/pih/systems/mtcs/webusr/webusr.html>

2.3. Select the Date

After you complete the 'level of information' selection,

- Use your mouse to select the Historical Date.

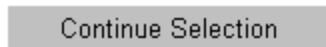


- * To view the *Historical Reports*, you must select a report Date.
- * Historical data is only available on a quarterly basis beginning September 1998.
- * To select multiple quarters from the Date list, press and hold the <Shift> key, then click with the mouse on the desired dates OR hold down the <Shift> key and press the down arrow on your keyboard.

2.4. Select Report Options

After you complete the 'Date' selection,

- Use your mouse to select the *Continue Selection* button.



Additional report options appear in the bottom half of the screen based on the Program and Level of Information the user selects.

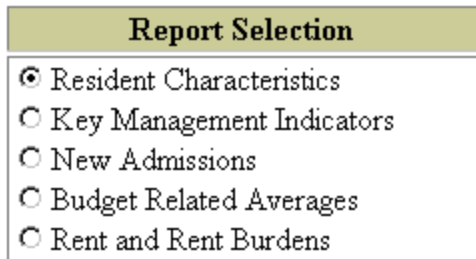
- Use your mouse to select the required report options.

For example, if you select 'State' as the level of information for the report, a drop down list of states appears in the bottom portion of the window. Find the desired state in the list and select that state with you mouse.

2.5. Select a Historical Report

After you complete the report options section,

- Use your mouse to select one of the five historical reports from the *Report Selection* area on the screen.

A screenshot of a web form titled "Report Selection" in a green header. Below the header is a white box containing five radio button options: "Resident Characteristics" (selected), "Key Management Indicators", "New Admissions", "Budget Related Averages", and "Rent and Rent Burdens".

Report Selection
<input checked="" type="radio"/> Resident Characteristics
<input type="radio"/> Key Management Indicators
<input type="radio"/> New Admissions
<input type="radio"/> Budget Related Averages
<input type="radio"/> Rent and Rent Burdens

After you select a report,

- Use your mouse to select the *Go* button.



The selected report appears on your screen.

- * Depending on the number of historical periods you have selected, reports may cross several web pages. To view additional report pages, press the *Next Page* button at the bottom of the page.

3. Data Field Definitions

The data field definitions associated with the five historical reports available (Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens) are contained in the detailed guides specific to each of the five reports.

- * For detailed information on the Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens reports, please go to the *MTCS Web Reports Guide* web site:

<http://www.hud.gov/pih/systems/mtcs/webusr/webusr.html>

4. Report Applications

There are a variety of different uses for MTCS *Historical Reports*. This section highlights some of the ways MTCS users can use the data contained in the historical reports.

HUD intends users to challenge information contained in MTCS historical reports because often, upon further investigation, the problems or issues may be different than they appear in MTCS. Use MTCS data and reports as a starting point for discussion, investigation, research, and analysis. HUD encourages all MTCS report users to post questions and comments to the Forums located on the MTCS web site:

<http://www.hud.gov/pih/systems/mtcs/forums.html>

4.1. PHA Uses for the Report

PHAs can perform historical trend analysis and view historical information for five of the *MTCS Reports*: Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens.

The benefits of historical trend analysis include:

- Ability to review data over multiple periods
- Ability to compare historical data to current data
- Enhanced reporting compliance
- Improved PHA efficiency
- Ability to review income, tenant occupation, and other key management data trends beginning with September 1998 on a quarterly basis to the present.

Suggested uses for each historical report include:

Resident Characteristics Report (RCR)

- Monitor reporting rates
- Assess PHA turnover
- Evaluate deconcentration requirements
- Comply with fair housing and equal opportunity requirements
- Obtain profiles of assisted housing tenants

Key Management Indicators (KMI)

- Assess and improve PHA performance
- Assess housing inventory
- Conduct research

New Admissions

- Plan and administer programs
- Evaluate PHA outreach and tenant selection activities

Budget Related Averages

- Solve problems and analyze issues

Rent and Rent Burdens

- Solve problems and analyze issues

* For detailed information on the Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens reports, please go to the *MTCS Web Reports Guide* web site:

<http://www.hud.gov/pih/systems/mtcs/webusr/webusr.html>

4.2. HUD Uses for the Report

HUD staff, Field Offices, and TARCs can perform historical trend analysis and view historical information for five of the *MTCS Reports*: Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens.

The benefits of historical trend analysis include:

- Ability to review data over multiple periods
- Ability to compare historical data to current data
- Enhanced reporting compliance
- Improved PHA efficiency
- Ability to review income, tenant occupation, and other key management data trends beginning with September 1998 on a quarterly basis to the present.

Suggested uses for each historical report include:

Resident Characteristics Report (RCR)

- Assess reporting rates
- Analyze housing inventory
- Obtain profiles of assisted housing tenants

Key Management Indicators (KMI)

- Compare PHAs and disseminate best practices
- Examine an individual PHA

New Admissions

- Monitor PHA compliance with fair housing and equal opportunity requirements

Budget Related Averages

- Assess PHA performance and monitor quality

Rent and Rent Burdens

- Assess PHA performance and monitor quality

* For detailed information on the Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens reports, please go to the *MTCS Web Reports Guide* web site:

<http://www.hud.gov/pih/systems/mtcs/webusr/webusr.html>

5. Business Rules

Business rules for the five available historical reports can be found in the detailed guides specific to each of the reports.

- * For detailed information on the Resident Characteristics, Key Management Indicators, New Admissions, Budget Related Averages, and Rent and Rent Burdens reports, please go to the *MTCS Web Reports Guide* web site:

<http://www.hud.gov/pih/systems/mtcs/webusr/webusr.html>